

Review Appropriations and Appropriation Line Balances Online:

Step 1: Setup an Appropriation inquiry screen,

Navigation: Commitment Control > Review Budget Activities > Budget Inquiry > Budget Overview. Then add new inquiry value

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Menu

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Budgets Overview

Find an Existing Value | Add a New Value

Inquiry Name: Appn_Test

Add

Find an Existing Value | Add a New Value

After you select “Add” the following screen will appear. Fill in the following fields: Description, Ledger Group, Operating Unit

Inquiry: APPN_TEST Description: Appropriation Inquiry

Amount Criteria Search Clear Delete Refresh

Budget Type

*Business Unit: 40800 Ledger Group: APPROP Appropriation Ledger

Ledger Inquiry Set:

TimeSpan

*Type of Calendar: Detail Bdg Per Stat Code

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	APPROP	BI	2005A	2005A	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

Short Name	ChartField	ChartField Value	To Value
Oper Unit	OPERATING_UNIT	408	408
Fund	FUND_CODE	%	%

Budget Status

- ☒ Open
- ☒ Closed
- ☒ Hold

Save Notify Add Update/Display

Once these screens have been filled out, select the **search** button and the following screen will appear:

Business Unit: 40800
Ledger Group: APPROP Appropriation Budget
Type of Calendar: Detail Bdgt Per
Amounts in Base Currency: USD
Revenue Associated ☐

Display Options *Notes **Max Rows:** **Fetch**

Ledger Totals (3 Rows)

Budget+Adjustment:	9,984,261.00	Available Budget:	9,545,872.08
Expense:	438,388.92	Net Transfer:	0.00
Pre-Encumbrance:	0.00	Associate Revenue:	0.00
Encumbrance	0.00	Remaining Balance:	9,545,872.08
Available Budget:	9,545,872.08		

The first half of the screen will show you your total appropriation, total expenditures to date, and your remaining available budget. Remember, this total is by all funds. To see your authority by funding source, go to the bottom of this screen:

Budget Overview Results				Customize Find View All	First	1-3 of 3	Last
Budget Chartfields		Budget Amounts					
		<u>Operating Unit</u>	<u>Fund Code</u>	<u>Budget Period</u>			
1		408	002	2005A			
2		408	003	2005A			
3		408	004	2005A			

[Return to Criteria](#)

Select the “Show All” icon and then “Customize” your screen to show only the following fields:

Budget Overview Results				Customize Find View All	First	1-3 of 3	Last
		<u>Operating Unit</u>	<u>Fund Code</u>	<u>Budget Period</u>	<u>Budget</u>	<u>Expense</u>	<u>Available Budget</u> <u>Percent Available</u>
1		408	002	2005A	5,697,767.00	263,037.69	5,434,729.31 95.38
2		408	003	2005A	375,000.00	311.13	374,688.87 99.92
3		408	004	2005A	3,911,494.00	175,040.10	3,736,453.90 95.52

[Return to Criteria](#)

By selecting these fields, you see total Budget, total Expenses, Available Budget remaining, and the Percent of your budget available. To eliminate other fields that you do not want on your screen, just select them and check the “Hidden” box.

Budget Overview Results

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

- Tab Budget Chartfields (frozen)
- (column 3) (frozen)
- Ledger Group (hidden)
- Operating Unit
- Fund Code
- Budget Period
- Tab Budget Amounts
- Budget
- Expense
- Encumbrance (hidden)
- Pre-Encumbrance (hidden)
- Available Budget*
- Percent Available
- Budget Entry Type (hidden)

☒ Hidden
☐ Frozen

Sort Order

☐ Descending

Fund Code 002 is your Federal Fund Appropriation
Fund Code 003 is your Special Fund Appropriation
Fund Code 004 is your General Fund Appropriation

Once you have all your fields selected, you are now ready to save your inquiry request. The next time you want to inquiry on your appropriation budget, just select your template and select the search button and your appropriation budget will appear.

Step 2: Setup an Appropriation Line inquiry screen:

Menu

- Commitment Control
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Budgets Overview

[Find an Existing Value](#) [Add a New Value](#)

Inquiry Name: Appn_line

[Add](#) [Add \(Alt+1\)](#) [Find an Existing Value](#) [Add a New Value](#)

After you select the “Add” button, the screen below will appear.

On this screen, fill in the following fields: Description, Ledger Group (should be Appn Line), Operating Unit, and From Budget Period to Budget Period (the periods should be 2005L1 to 2005L2). Leave the Class field as % to show all your line items.

Inquiry: APPN_LN **Description:** Appropriation Line

[Amount Criteria](#) **Search** **Clear** **Delete** **Refresh**

Budget Type

*Business Unit: 40800 ☒ **Ledger Group** **Ledger Group:** APP_LN Appropriation Line
☐ **Ledger Inquiry Set** **Ledger Inquiry Set:**

TimeSpan

*Type of Calendar: Detail Bdgt Per ☐ **Stat Code**

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	APP_LN	BL	2005L1	2005L2	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

ChartField Criteria

Short Name	ChartField	ChartField Value	To Value
Oper Unit	OPERATING_UNIT	408	408
Class	CLASS_FLD	%	%

Budget Status

- ☒ Open
- ☒ Closed
- ☒ Hold

Once these fields have been filled out, select the **search** button, and it will take you to the following screen:

Business Unit: 40800
Ledger Group: APP_LN Appropriation Line Budget
Type of Calendar: Detail Bdgt Per
Amounts in Base Currency: USD
Revenue Associated ☐

Display Options *Notes **Max Rows:** 100 **Fetch**

Ledger Totals (6 Rows)

Budget+Adjustment:	8,492,071.50	Available Budget:	8,053,682.58
Expense:	438,388.92	Net Transfer:	0.00
Pre-Encumbrance:	0.00	Associate Revenue:	0.00
Encumbrance	0.00	Remaining Balance:	8,053,682.58
Available Budget:	8,053,682.58		

The top half of the screen will show you the total of your lines items. The bottom on the screen is where you can see each line item by (Class Field).

Budget Overview Results											
				Customize Find View All			First 1-12 of 12 Last				
	Ledger Group	Operating Unit	Class Field	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Available	Budget Entry Type
1	APP_LN	408	40810	2005L1	3,578,622.75	3,526,582.72	0.00	0.00	52,040.03	1.45	Original
2	APP_LN	408	40810	2005L2	1,192,874.25	585,100.40	0.00	0.00	607,773.85	50.95	Original
3	APP_LN	408	40830	2005L1	897,945.75	825,375.53	0.00	0.00	72,570.22	8.08	Original
4	APP_LN	408	40830	2005L2	299,315.25	150,820.82	15,082.73	0.00	148,494.43	49.61	Original
5	APP_LN	408	40850	2005L1	35,011.00	0.00	0.00	0.00	35,011.00	100.00	Original
6	APP_LN	408	40850	2005L2	0.00	0.00	0.00	0.00	0.00	0.00	Adjustment
7	APP_LN	408	40860	2005L1	62,000.00	42,378.42	0.00	0.00	19,621.58	31.65	Original
8	APP_LN	408	40860	2005L2	0.00	729.82	0.00	0.00	-729.82	0.00	Adjustment
9	APP_LN	408	40870	2005L1	3,668,492.00	1,729,035.65	0.00	0.00	1,939,456.35	52.87	Original
10	APP_LN	408	40870	2005L2	0.00	56,440.05	0.00	0.00	-56,440.05	0.00	Adjustment
11	APP_LN	408	40871	2005L1	250,000.00	226,623.76	0.00	0.00	23,376.24	9.35	Original
12	APP_LN	408	40871	2005L2	0.00	1,619.61	0.00	0.00	-1,619.61	0.00	Adjustment

To get your screen to look like above, select the “Show All” icon, and then select the “Customize” link and hide all other fields that you do not want on your inquiry screen.

Once you have customized it the way you want, you will see your total budget for each of your line items or class fields. Budget Period 2005L1 is for the first 18 months of the biennium and 2005L2 will be for the last 6 months of the biennium. The Class field is your operating unit plus each appropriation line item that your agency has.